



BI Reporting Job Aid

Reduction in Force (RIF)

Reduction in Force

While job security is important to everyone, it is sometimes necessary for the state to reduce the number of people it employs due of lack of work, loss of funding, reorganization or other similar reasons. If a reduction in force (RIF) occurs, every effort will be made to assist employees in securing another job.

Agencies must give employees at least 30 calendar days notice of an impending reduction in force. This notice must be in writing and should contain the reasons for the reduction in force, the expected date of separation from state government, information on priority reemployment rights and any applicable appeal rights.

Two reports are available to review and analyze data related to a Reduction in Force, RIF. This job aid provides an overview of those reports, their intended use, and navigation tips. The reports are:

- B0020: RIF Verification
- B0021: Employees Eligible for RIF Priority

Selection criteria are explained for the B0020 report in this job aid. Additional navigation tips, such as how to filter, total, and move columns on the reports are included in the section for the B0020 report. These navigation tips can be used in any of the reports.

B0020 – RIF Verification (starts on page 02)

This report lists all actions for an employee. B0021 is designed as follows:

References infotype 0041 - Date Specifications to see if there is a value of 06 - Notification of RIF.

B0021 – Employees Eligible for RIF Priority (starts on page 07)

This report lists employees who have been separated due to RIF. It includes the date they were notified about being placed on RIF and the date when their RIF Priority ends. B0021 RIF Priority End Date calculation was changed to use the following logic:

If notify date < 07/01/2009 then Priority End Date is 12 months after notification date.

If notify date is between 07/01/2009 AND 06/30/2011 then Priority End Date is 24 months after notification date.

If notify date > 06/30/2011 then Priority End Date is 12 months after notification date.

***NOTE:** While this document contains real examples of the reports, every effort has been taken to protect the privacy of the individuals whose data is utilized. In order to achieve this, the screen shots that contain salary information have been taken from an unidentified agency and do not match the positions and jobs which are shown.



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B0020 RIF Verification Report

Welcome State of North Carolina Employees

NCID *
Password *

For human resources, payroll or BEACON system assistance, call 919-707-0707 in the Raleigh area, or 1-866-NCBEST4U (866-622-3784) statewide, from 8 a.m. to 5 p.m., Monday through Friday.

For NCID assistance, contact your agency's NCID administrator, or to reset your NCID password visit, <https://ncid.nc.gov>.

[Customer Service](#) | [System Status](#) | [Privacy and Security](#) | [Legal](#)

1. Access the BEACON Portal.
2. Click on the **Reports Tab**.



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Reports
Personnel Admin

Detailed Navigation

- ▼ Cross Agency Verification
 - B0020: RIF Verification
 - B0157: Verify Employment

Business Intelligence Personnel administration

DEV Updates!
Report Alert

There are 59 Personnel Administration reports currently available for reporting!

[Report](#)

[Meet our Subject Matter Experts](#)

3. Click on **Personnel Admin**.

Reports
Personnel Admin

Detailed Navigation

- ▼ Cross Agency Verification
 - **B0020: RIF Verification**
 - B0157: Verify Employment

Business Intelligence Personnel administration

DEV Updates!
Report Alert

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[Report](#)

[Meet our Subject Matter Experts](#)

4. Select Report from the workset on the left.

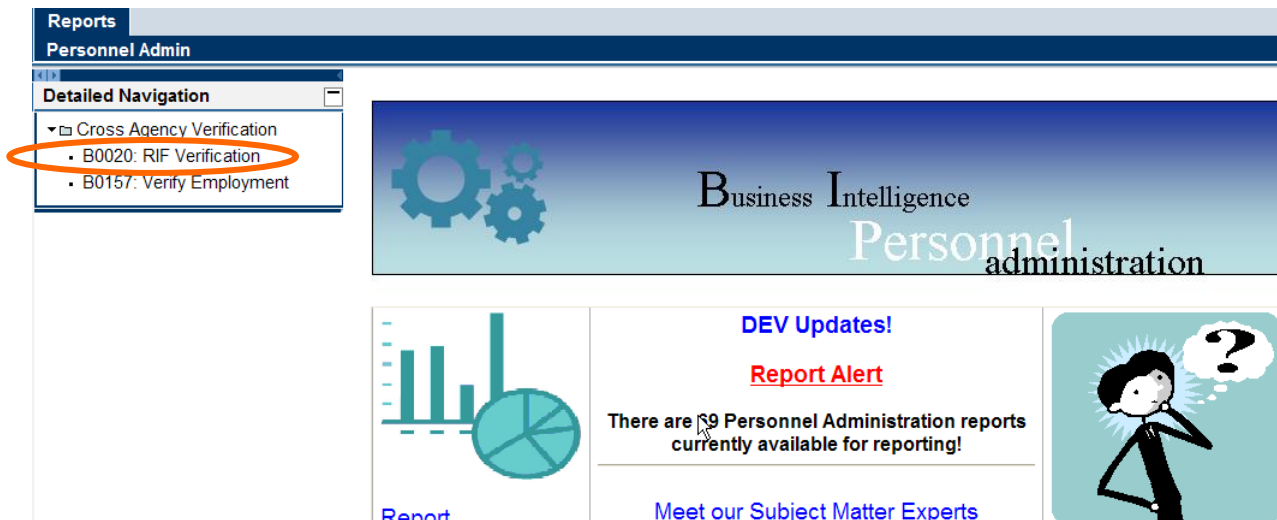


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5. Click on **Cross Agency Verification** folder (click on the black arrow to expand folder).



6. Click on **B0020 RIF Verification**.



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Variable Entry

Available Variants: [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Last 4 Digits of SSN (XXXX - Sing	<input type="text"/>	
* Last Name of Employee in UPPEI	<input type="text"/>	

- Enter the Last 4 Digits of SSN by clicking on the icon to search for a SSN, or by keying a 4-Digit number directly into the box.
- Enter a **Last Name in UPPERCASE** by clicking on the icon to search for a name, or by keying a Last Name directly into the box.

NOTE: The report will only return the data for which you have security to view.

- Click the button and wait for the report to be displayed.

B0020: RIF Verification

No exceptions are defined

Personnel Area	Employee	Hours per week	Employee's Name	Job	Schematic Code	Effective Date
State	1234567	40.00	MOUSE, MICKEY	Personnel Analyst I	30000997 1821	01/01/2008

Action Reason	Position	Pos Pay Level	Pos County	Emp Pay Level	Annual Salary
01 CONVERSION-Withdrawn	99999999 99999999	#	# Not assigned	59	0



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To access **B0021: Employees Eligible for RIF Priority**, the user must ‘jump’ to the report via a report to report interface.

To jump to B0021, right-click on a specific row and column of interest (in the gray area) and then select **Goto > B0021: Employee Eligible for RIF Priority**.

In the following example, the cursor is placed at the row with a specific **Employee** value in the column then right-click and select **Goto->B0021: Employees Eligible for RIF Priority**. This action will then launch the B0021 report and pre-filter the B0021 data elements based on the specific values coming from the B0020 report:

B0020: RIF Verification

Display As [Information](#) [Print Version](#) [Export to Excel](#)

▼ Columns

- Key Figures

▼ Rows

- Personnel Area
- Employee
- Job
- Schematic Code
- Effective Date
- Action Type
- Action Reason
- Position

Personnel Area	Employee	Hours per week	Job	Schema
Not assigned		0.00	Not assigned	# #

Back ▶

Goto ▶ B0021: Employees Eligible for RIF Priority

Filter ▶

Change Drilldown ▶

Broadcast and Export ▶

Properties ▶

Exceptions ▶

Sort Personnel Area ▶

Based on the above filtering, the results for B0021 are shown below. The B0021 report shows the employee(s) which meet the above filtering criteria.



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B0021: Employees Eligible for RIF

Employee's Name	Employee	Notification Date	Priority End Date
MOUSE, MICKEY	1234567	06/01/2008	06/01/2009



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B0021 Employees Eligible for RIF Priority Report

B0021: Employees Eligible for RIF

Employee's Name	Employee	Notification Date	Priority End Date
MOUSE, MICKEY	1234567	06/01/2008	06/01/2009

The B0021 report will display all employees within the selected area which match the selection criteria.

NOTE: You may drag columns on or off the report using standard BI reporting functionality. Some examples of how to alter the view of the report are included in this document.

The columns in the “ledger” (blue and white) area of the report cannot be moved or manipulated.



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Moving a column on the report using drag and drop functionality

Personnel Area	Employee	Hours per week	Employee's Name	Job	Schematic Code	Effective Date	Action Type	Action Reason
State	1234567	40.00	MOUSE, MICKEY	Personnel Analyst I	30000997	1821	01/01/2008 ZW	CONVERSION-Withdrawn
State	8910111	40.00	FUDD, ELMER	Personnel Analyst I	30009999	1800	03/08/2008 Z2	Re-Instatement (NC)

1. Click on the column heading and drag it to the position on the report where you want it (watch for the dark black line), then let go of the mouse button. In this example we will drag the Employee field to the right of the Hours per Week field.

Personnel Area	Hours per week	Employee	Employee's Name	Job	Schematic Code	Effective Date	Action Type	Action Reason
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	1821	01/01/2008 ZW	CONVERSION-Withdrawn
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	1800	03/08/2008 Z2	Re-Instatement (NC)

Notice that now the Employee column is to the right of the Hours per Week column. This report is now arranged by Employee within Hours per Week.



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Removing a column on the report

Personnel Area	Employee	Hours per week	Employee's Name	Job	Schematic Code	Effective Date	Action Type	Action Reason	
State	1234567	40.00	MOUSE, MICKEY	Personnel Analyst I	30000997	1821	01/01/2008 ZW	CONVERSION-Withdrawn	01 CONVERSION-Withdrawn
State	8910111	40.00	FUDD, ELMER	Personnel Analyst I	30009999	1800	03/08/2008 Z2	Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G

1. Click on the column heading and drag it up to the dark blue area of the screen, then let go of the mouse button. In this example we will eliminate the Schematic Code column by dragging and dropping its column heading into the dark gray area.

Personnel Area	Hours per week	Employee	Employee's Name	Job		Effective Date	Action Type		Action Reason
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	01/01/2008	ZW	CONVERSION-Withdrawn	01 CONVERSION-Withdrawn
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2	Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G

Notice that the Schematic Code column is no longer shown in the report.

Filtering the report to see only positions in a particular Employee Subgroup



Schematic Code	Effective Date	Action Type	Action Reason
#	01/01/2008	ZW	CONVERSION-Withdrawn
1821	03/08/2008	Z2	Re-Instatement (NC)
1813	04/30/2008	Z2	Re-Instatement (NC)
#	08/04/1977	Z2	Re-Instatement (NC)

Goto
Filter
Change Drilldown
Broadcast and Export
Properties
Exceptions
Sort Action Type

Keep Filter Value
Keep Filter Value on Axis
Filter and Drill Down By
Select Filter Value
Remove Filter Value
Variable Screen

1. Right-click on the **Action Type** column.
2. Click on **Filter > Select Filter Value**.



- Click on the  in front of the value “**Z2**” to select only the **Z2** Action Types. Values on the left hand side represent the values that are included on the report you are viewing. If you don’t see a particular value, it means that this value does not occur in the current report being displayed.
- Click the  button.



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Select values for Action Type (0ACTIONTYPE)

Show tool: Show view:

All

Maximum

Action Type Key	Action Type Medium Text
<input type="checkbox"/>	
<input checked="" type="checkbox"/> Z2	Re-Instatement (NC)
<input checked="" type="checkbox"/> Z9	Appointment Change (NC)
<input checked="" type="checkbox"/> ZW	CONVERSION-Withdrawn
<input checked="" type="checkbox"/> ZZ	CONVERSION-Active
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Enter a value for Action Type:

Selections

Type	Description
<input checked="" type="checkbox"/> =	Z2 Re-Instatement (NC)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

5. Click .

NOTE: If the item to be filtered on is not located in the right-hand column (as a result of clicking the Add button), it will not be filtered.

Now the report only shows employees that have an Action Type of Z2, Re-instatement.

Personnel Area	Hours per week	Employee	Employee's Name	Job	Effective Date	Action Type	Action Reason	Position	
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	99999999 99999999

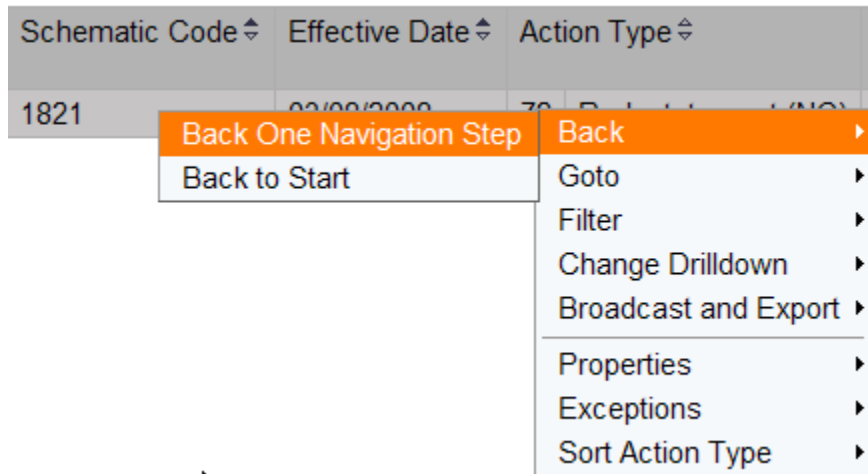
This same technique can be used to filter the values for other columns on the report.



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To go back one step



1. Right-click anywhere within the **gray portion** of the report (not the blue area).
2. Click on **Back > Back One Navigation Step**. This will cause the report to revert back to how it looked before the filter was set.

Personnel Area	Hours per week	Employee	Employee's Name	Job	Effective Date	Action Type	Action Reason	Position	
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	01/01/2008	ZW CONVERSION-Withdrawn	01 CONVERSION-Withdrawn	99999999
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	99999999

Now the report is back to the way it looked prior to applying the filter.



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Additional Filtering Options

Filter Settings				
Position ▾	Pos Pay Level ▾	Pos County ▾	Emp Pay Level ▾	Annual Salary ▾

1. Click on the **Filter** link at the top of screen (scroll over to the right if you do not see it).

To adjust filter area, drag characteristics from navigation area into filter area

Action Reason:	Show All Values ▾	Action Type:	Show All Values ▾	Agency Hire Date:	Show All Values ▾
Age Range:	Show All Values ▾	Cal Mth/Yr:	Show All Values ▾	Country:	Show All Values ▾
Effective Date:	Show All Values ▾	Employee:	Show All Values ▾	Employee's Name:	Show All Values ▾
Employee Group:	Show All Values ▾	Employee Subgroup:	!Contractor ▾	Employment Status:	Show All Values ▾
Emp Pay Area:	Show All Values ▾	Emp Pay Group:	Show All Values ▾	Emp Pay Level:	Show All Values ▾
Emp Pay Type:	Show All Values ▾	ESG CAP:	Show All Values ▾	Ethnic Origin:	Show All Values ▾
Fiscal period/year:	Show All Values ▾	Gender:	Show All Values ▾	Job:	Show All Values ▾
Job Branch:	Show All Values ▾	Job Family:	Show All Values ▾	Key Figures:	Show All Values ▾
Last Four of SSN:	2728 ▾	Length of Serv. as of Date of Action:	Show All Values ▾	Organizational Unit:	Show All Values ▾
Original Hire Date:	Show All Values ▾	Personnel Area:	Show All Values ▾	Personnel Subarea:	Show All Values ▾
Pos Addr Street:	Show All Values ▾	Pos City:	Show All Values ▾	Pos Country:	Show All Values ▾
Pos County:	Show All Values ▾	Position:	Show All Values ▾	Pos Pay Area:	Show All Values ▾
Pos Pay Group:	Show All Values ▾	Pos Pay Level:	Show All Values ▾	Pos Pay Type:	Show All Values ▾
Pos State:	Show All Values ▾	Prior Position:	Show All Values ▾	Processed Date:	Show All Values ▾
Schematic Code:	Show All Values ▾	SOC Code:	Show All Values ▾	Supv Employee:	Show All Values ▾
Supv Position:	Show All Values ▾				

[Close](#) [Variable Screen](#) [Display All Filter Values](#)

Additional options for filtering the report are now available. Note that the values on which you may filter are based on the available data elements shown on the existing report.

2. Click the **Close** button to hide the filter screen or click **Variable Screen** button to keep your filter settings and go back and choose another Employee.

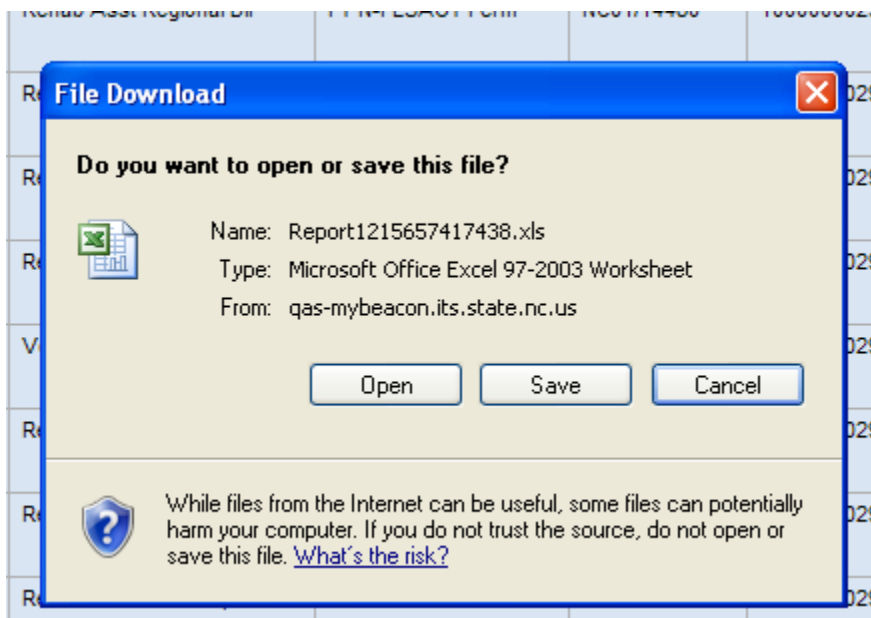


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Exporting to Excel

To export to Excel, click on the **Export to Excel** button.



You will be presented with an option to Open or Save the file (this is up to you). It all depends on whether you want to save the file before viewing it, or after viewing it.

B0020: RIF Verification

No exceptions are defined

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Personnel Area	Hours per week	Employee	Employee's Name	Job		Effective Date	Action Type	Action Reason	Position
State	40.00	1234567	MOUSE, MICKEY	Personnel Analyst I	30000997	01/01/2008	ZW CONVERSION-Withdrawn	01 CONVERSION-Withdrawn	99999999
State	40.00	8910111	FUDD, ELMER	Personnel Analyst I	30009999	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	99999999

This is a sample of what the output might look like in Excel.



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Printing the Report

While we do not recommend printing BI reports, there may be times when you wish to do so. To generate a printed copy, click on the [Print Version](#) button.

BEx Web -- Webpage Dialog

Print Version

Scaling Factor

- ☒ Fit to page width
- ☐ Fit to page
- ☐ Poster

Page

Theme:

Size:

Orientation:

Margins

Top:

Bottom:

Left:

Right:

Header

Left:

Center:

Right:

Footer

Left:

Center:

Right:

Leave the **Margins** as is, for when you change to inches it causes a formatting issue. You may select Portrait or Landscape format. In this example, we have chosen Landscape format.

Personnel Area	Job	Schematic Code	Effective Date	Action Type	Action Reason	Pos Pay Level	Pos County	Emp Pay Level	Annual Salary
Administration	Not assigned	#	01/01/2008	ZW CONVERSION-Withdrawn	01 CONVERSION-Withdrawn	#	#	Not assigned	59
Health Human Services	Personnel Analyst I	30001000 1821	03/08/2008	Z2 Re-Instatement (NC)	01 Rtn St w/in 12 mths-Same S/G	#	092 Wake	70	22
	Personnel Technician III	30000997 1813	04/30/2008	Z9 Appointment Change (NC)	08 Supplemental to Probation	#	092 Wake	68	49,637
Not assigned	Not assigned	#	08/04/1977	ZZ CONVERSION-Active	01 CONVERSION-Active	#	#	Not assigned	NA

The resulting report will be displayed in PDF format. You will then want to choose the Print functionality from within your web browser to print the report.



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Key BI Points to Remember:

- Do not use the Back button on the browser to go back. (Instead use “Back One Navigation Step”.)
- BI Reports sort from the left to right.
- Columns can be removed by dragging up and dropping in the gray area.
- To generate totals for a particular column, right-click on the column to the immediate right and choose Properties > Characteristic>General Tab. In the Display Data Values field choose Always. This will cause the report to total by that column.
- A ‘#’ in the field indicates that there is no value for this field in SAP.

NOTE: The report will only return the data for which you have security to view.

APPENDIX

The description of fields on the reports are as follows:

Personnel Area	Agency
Position	Position number and Title
Employee	Employee Personnel Number
Employee Name	Employee Last and First name
Last 4 of SSN	Last 4 digits of Employee’s SSN
Employee Pay Level	<p>Employee pay level information in the following format: AA/BB/CC/D/EEEE/FF where:</p> <ul style="list-style-type: none"> • AA = Country (always 10 for USA) • BB = Pay Scale Type (01 = Graded, 02 = Banded, etc.) • CC = Pay Scale Area (1 = hourly, 2 = salaried) • DD = Sub grouping for Personnel Calculation Rule • EEEE = Pay Grade (GR## if graded, otherwise 8 digit id) • FF = Level (Represents the salary grade for graded employees, and the Competency Level for banded employees) <p>NOTE: These values cannot be separated into separate columns on the report, but are available for your reference.</p>